

Plan Market Development Subcommittee
Draft 5-29-03 Meeting Minutes

The first meeting of the Market Development Subcommittee was held at RIRRC on May 29, 2003. In attendance were: Claude Cote (RIRRC), Patrick Fingliss (RIRRC), Leo Hellested (DEM), Dante Ionata, Eugene Park (URI Center for Pollution Prevention), and John Trevor (RIRRC). Subcommittee members not present were Mark Adelman (Governor's Office), Shim Silverstein (United Paper Stock). Dante announced at the meeting that Andrew Dzykewicz, from the Economic Development Corporation would be representing EDC going forward.

➤ **Market Development Defined**

Market Development – the committee sought to define “Market Development” in the framework of Solid Waste Management. It was agreed that in this context, Market Development would be considered activities that provided or stimulated the demand for materials recovered for recycling or the utilization of material(s) that would have otherwise been disposed of in the landfill.

➤ **Other States' Programs**

The committee reviewed a survey ([below](#)) of other states' Market Development Programs. The size and scope of these programs varies dramatically. Some states (like RI) have no formalized program, and others have organized programs with a diverse range of staffing and funding levels. California maintains the Nation's largest program with a staff of 90 and a budget of \$7,000,000 to support to Recycling Market Development initiatives. (A handout on California's Program was also distributed). More information can be found on this program at <http://www.ciwmb.ca.gov/Markets/>.

➤ **Location & Funding**

Unlike some of the other states' in the survey, there is currently no agency or department specifically working on Recycling Market Development in Rhode Island. Such a program could be operated by either RIRRC, EDC or another entity. However, a potential funding source for a program does not presently exist. The Committee discussed what potential funding sources might be including the hard-to-dispose advance disposal fee, tip fee surcharge, or federal grants. However, no conclusion was reached on how a Market Development program might be funded.

The committee discussed The Chelsea Center for Environmental and Economic Development in Massachusetts. The state of Massachusetts in Partnership with the University Massachusetts launched the Chelsea Center for Recycling and Economic Development in 1995 to create jobs, support recycling efforts, and help the economy and the environment by working to increase the use of recyclables by manufacturers.

The Chelsea Center is a part of the University of Massachusetts. It was formed through the Strategic Technology Partnership (STEP) Program, a partnership between the University of Massachusetts, the state Executive Office of Environmental Affairs, and the Massachusetts Office of Business Development. Funding comes primarily from the STEP Program and the Clean Environment Fund (CEF). The CEF is comprised of unredeemed bottle deposits, and is managed by the Executive Office of Environmental Affairs. Information about the Chelsea Center can be found at <http://www.chelseacenter.org>.

The potential to replicate a program like the Chelsea Center would require action on the part of the legislature and/or the Governor's office.

➤ **Rhode Island Situation & Regional Efforts (NERC)**

The committee agreed that the size of Rhode Island and the nature of its economy present inherent limits to the potential scope of a formalized Recycling Market Development program. An alternative would be to support what is being done regionally in this area by the [Northeast Recycling Council \(NERC\)](#). NERC is a regional organization working directly with the state agencies of the 10 member states. NERC is unique in the Northeast, in that it is the only forum for cooperative research, collaborative action, and networking on regulatory, market and business development issues that link recycling and economic development. (See NERC fact attached to email).

In 2001, RIRRC partnered with NERC, EDC, The US Small Business Association (SBA), the Small Business Development Center (SBDC) and Fleet Financial Services to sponsor a Recycling Business Financing Seminar. The seminar was designed to assist those that work with small businesses to better understand the recycling industry, how recycling enterprises add value to the state's economy, and how recycling companies operate.

The goal of the training provided by the seminar was to assist the attending bankers, attorneys, accountants, economic developers and non-profit organizations to maximize their effectiveness when assisting recycling entrepreneurs with developing their business plans and obtaining necessary financing. The Seminar was held in June at Bryant College in Smithfield, and featured several excellent presentations. However, attendance at the seminar was limited, despite free attendance (made possible through sponsorships) and concerted marketing and promotion efforts by the sponsoring organizations.

➤ **Economic Considerations & Markets**

The impact of national and global economic conditions and their ancillary impact on markets for recovered materials were discussed. China's role as a primary market for fiber and steel was recognized. A copy of an April Wall Street Journal Article was distributed (attached) indicating that the China is currently the largest market for U.S. Scrap exports, accounting for 23% or \$1.2 billion in 2002. According to the RI Export Assistance Center, scrap and waste was Rhode Island's second largest export category in 2002, for a total value of \$144,787,758.

○ *Fiber Market*

Shim Silverstein indicated the SARS epidemic was having a detrimental effect on the fiber market, and United Paper Stock's ability to market its product. It was his opinion that fundamental to all market development efforts was a strong global economy, and that this would create demand for secondary fiber and other materials. Currently more than 80% of all paper mills in the U.S. use recovered paper to make their products, and nearly 200 mills use exclusively recovered paper.

The American Forest and Paper Association (AFPA) has set a recovery goal of 55% for all paper consumed in the U.S. by 2012. However, if domestic and export demand for recovered paper grows, the paper industry runs the risk of seeing existing paper and paperboard capacity idled due to insufficient supply.

The use of Flexographic Ink by the Providence Journal and the marketing limitations created for newsprint processed at the RI Materials Recovery Facility (MRF) was discussed. It was concluded that the Journal's switch to this ink type has positive environmental benefits with respect to effluents. Unfortunately a number of recycled paper mills are not equipped to de-ink newsprint with Flexographic ink, and therefore not available as market for RI newsprint which is estimated to contain as much as 75 - 80% Flexographic inked newsprint from the Providence Journal. (This 'guesstimate' should be verified).

○ *Plastics Market*

The potential for Market Development for post-consumer plastic bottles in RI was discussed. Committee members indicated that the entire annual volume of plastic bottles currently recovered from the waste stream and processed at the Materials Recycling Facility would not provide sufficient feedstock of either #1 High Density Polyethylene (HDPE) or #2 Polyethylene Terephthalate (PET) for a typical Plastics reclaimer or processor were a new facility to be sited in RI. Additional material from out of state would have to be imported to supplement material from the MRF if a plant were sited here.

Additionally, there are structural issues affecting the Plastic Markets. According to the National Association for Plastic Container Recovery, reclamation capacity significantly exceeds supply of recovered bottles. In 2001, 834mm lbs. of post-consumer bottles were purchased. As of May 2003, U.S. PET reclamation capacity was 946mm lbs.

➤ **URI Center for Pollution Prevention**

Gene Park from the Center from Pollution Prevention reported on [Pending Pollution Prevention Legislation](#) heard in the House Environment Committee on the previous day. (*At the time of this writing, I do not know the status of this legislation*)

While the focus of the legislation (attached to email) is on pollution prevention and source reduction, it could potentially have market development implications. The Center was involved in research on transforming squid waste into an Aquaculture product. This endeavor was similar to a project being undertaken by Alkahest to manufacture a machine that processes clamshells. RIRRC provided startup funding for this project, which was also funded by the Slater Center for Marine and Environmental technology.

➤ **Review of Previous Plan's Market Development Recommendations**

The subcommittee reviewed the recommendations in the Market Development section of the previous Comprehensive Plan:

- DEM and URI should continue remanufacturing research and devise a technology transfer strategy and explore funding opportunities.
- DEM should promote recycled product procurement by state agencies and quasi-state agencies that do not use the state's purchasing system extensively.

- DEM should focus future efforts regarding use of recycling emblems on influencing a national standard through NERC.
- DEM needs more funding to properly implement market development programs.
- DEM and the Corporation should continue involvement in regional market development efforts through NERC.

The Committee agreed that given the funding situation at DEM currently, and in the foreseeable future, it is unlikely that DEM will have a role in Market Development.

The Corporation and DEM continue to provide funding to NERC and be involved in regional market development efforts.

➤ **Subcommittee Tasks**

Procedurally, two potential objectives for the subcommittee were identified:

1. Develop the framework for a Market Development Program to incorporate into the plan, or
2. Recommend the initiation of a Market Development exploration project undertaken by a consultant. Other states such as Pennsylvania have employed this option.

It was agreed by the subcommittee that the first option would not be feasible undertaking for the subcommittee given the scope of such an undertaking and the time and resources available.

It was determined that the subcommittee should discuss the potential for a RI Market Development Study at the next meeting and determine what the elements of such a study should be potential organizations or consultants who might be engaged for the study.

In addition, the format and elements of the subcommittee's report to the Working Group in August will also be discussed.

ATTACHMENT – Sample of other Market Development Programs in US (Not Comprehensive)

Statewide Programs

Connecticut

No formal market development program. DEP Office of Waste Planning and Standards provides basic recycling technical assistance and refers businesses to DEP Ombudsmen for permitting, and Dept. of Economic and Community Development who deals with them as they would any other business.

DEP also promotes buy recycled and tracks market trends.

Funding comes from dedicated recycling trust that will be depleted in 1.5 years. There are 6 staff, although none in market development. They work with an EPP purchasing person in the Department of Administrative Services Purchasing Division.

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Kansas

Market development program is part of the state's environmental agency. It provides technical and business assistance to recycled product manufacturers, and grants or loans to businesses. It also promotes buy recycled and tracks market trends for various commodities.

Funding comes from a \$1.00/ton fee on solid waste through the state budget. There are three staff people that also administer other recycling programs.

Success is measured primarily through tones diverted and dollars leveraged, although jobs created and retained is also important.

Major partners are the Kansas Business and Industry Recycling Program, Inc. (non-profit business sponsored entity), the Kansas City Dept. of Commerce and Housing, Regional and State small business development centers for technical assistance, KTEC and MAMTEC for financial and technical assistance, and the Kansas State University small Business Environmental Assistance Program and Pollution Prevention staff. Other partners include EPA, NERC, NRC, MACRO, and JTR.

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Missouri

Missouri's market development organization is housed in the Environmental Improvement and Energy Resources Authority, a bond issuing authority that is attached to the state's Dept. of Natural Resources. The program itself is guided by a steering committee comprised of staff from EIARA, the Missouri Dept of Natural Resources, and the Missouri Dept. of Economic Development.

Services provided include technical and business assistance to existing recycled product manufacturers, grants and/or loans to businesses, feedstock conversion assistance, buy recycled education, recycled products directory, business and marketing planning assistance, and more. They also identify opportunities for new product development, and informally track commodity trends and opportunities.

Funding comes from 10% of the state solid waste management fund, not to exceed \$1,000,00.

The program is staffed by one program manager and one secretary. They contract with the University of Missouri Outreach and Extension and Missouri Enterprise for some services.

Success is measured by tons diverted, jobs created, jobs retained, dollars and other resources leveraged by clients.

Major partners include the University of Missouri Outreach and Extension, Missouri Enterprise, Missouri DNR, Missouri DED, and Missouri Recycling Association

Contact: Kristin Allan, Program Manager, 573-526-5555, nrallak@mail.dnr.state.mo.us

South Carolina

South Carolina's recycling market development agency is part of the state's Dept. of Commerce. Services include technical and business assistance to recycled product manufacturers, attraction of new businesses to the state, and business and industry recycling assistance relative to markets and service providers in the state.

The recycling market development agency identifies new products, promotes buy recycled, tracks market trends and opportunities for various commodities, promotes pro-recycling policies and recovery of materials where established markets exist.

Funding comes from Solid Waste Trust Funds which are environmental fees assessed at retail on certain products.

There are 2 staff, a RMD program manager and project manager split between market development and business recycling assistance.

Success is measured by jobs created, investment dollars from recycling businesses, number of clients assisted, and activity and success on RMD projects.

Major partners include the SC Recycling Market Development Advisory Council, the Dept. of Commerce which houses staff (provides no funding), and the Dept of Health and Environmental Control which provides technical support and awards funding from the Trust Fund.

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Indiana

Indiana's market development program is part of the state Department of Commerce, Energy and Recycling Office. Services include technical and business assistance to recycled product manufacturers, grants and/or loans to businesses, sponsoring of research into new recycling technologies, and attraction of new businesses. They also promote buy recycled, and track market trends and opportunities for various commodities.

Funding comes from a legislatively established dedicated fund fed by a portion of landfill tipping fees. One person manages the loan and grant funding program, technical assistance programs, buy recycled initiatives, marketing of the program, production of materials and reports, etc. An engineer is shared among other non-RMD programs in the office and does technical review and consultation on recycling projects.

Success is measured by tons diverted, jobs created, and dollars and other resources leveraged by clients.

The state's Dept of Commerce has 12 regional offices that help with outreach and resource dissemination, Local Economic Development Officials provide information for businesses or the community regarding information or funding relating to RMD, and may also suggest to companies ways to reduce waste, recycle, or create a product from recycled materials. They also work closely with local solid waste management districts who are responsible for planning and implementing regional solid waste management programs, other state

agencies such as the DEM, Family and Social Services Agency, DNR, etc. In addition, they work with the state recycling organization and other state and local non-profits.

Contact: Tiffany Sorge, Program Manager, 317-233-1951/ tsorge@commerce.state.in.us/

North Carolina

The North Carolina Business Assistance Center is located within the Dept of Environment and Natural Resources, with one staff member with an office in the state Department of Commerce. Services include technical and business assistance to recycled product manufacturers, grants and or loans to businesses (administered through Self-Help), sponsoring research into new recycling technologies, attraction of new businesses, feedstock conversion assistance, maintaining the state's recycling market directory, RBAC newsletter, and other publications, including updated market assessments of 29 different commodities. The Center also promotes buy recycled and tracks market trends and opportunities for various commodities.

Funding comes from the state budget, grants (JTR), and Self-Help, which contributed to funding for the Recycling Loan Fund. There are four staff people: A Manager (financing, regional and national issues), Dept. of Commerce Liaison (specializes in industrial recruitment), Market Development Specialist (electronics, paper, maintaining the Markets Directory), Market Development Specialist (C&D, newsletter development).

An Organics Specialist who, although not technically an RBAC staff member, works on many market development projects. Staff members focus on certain commodities, but there is also much collaboration on projects.

Success is measured by tons diverted, jobs created and retained, dollars and other resources leveraged by clients.

Major partners include Self-Help (Loan Fund Management); Department of Commerce: (industrial recruitment and retention). Small Business and Technology Development Centers, (business plans, workshops and courses—RBAC provides scholarships to recycling businesses), Carolina Recycling Association (workshop sponsorship, conference sessions on market development.).

Contact: Matt Ewadinger, matt.ewadinger@ncmail.net

New Hampshire

The New Hampshire Recycling Market Development Program is housed in the state's economic development agency. It provides technical and business assistance to recycled product manufacturers and works to attract new businesses to the state. It also promotes buy recycled and tracks opportunities for various commodities.

Funding comes from the state budget. There is one staff person responsible for day to day operations, technical support for financing, permitting site location and expansion developing new technologies, serving as a clearinghouse for and partnering with others in the state providing information on environmentally responsible practices.

Success is measured by jobs created and retained.

Major partners include a RMD Steering Committee that reviews and revises market development priorities, evaluates the impact of initiatives, etc; GROUPER, recycling professionals (state agencies and NGO's) meets monthly to share activities and collaborate on new projects, and NERC who helps with research and policy perspectives.

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Pennsylvania

Pennsylvania's RMD program is located in the state DEP. It provides business assistance to existing recycled product manufacturers, grants and/or loans to businesses, and funding to other state agencies to assist with market development in their areas of expertise—transportation, agriculture, general services. Pennsylvania also identifies new product opportunities, promotes buy recycled, tracks markets trends and opportunities for various commodities, provides funds to other agencies to perform some aspect of market development, and maintains a market directory of recyclers, processors, MRF's, unique recyclers, and recycled product manufacturers.

Funding comes from the state budget as well as landfill tipping fees. There are four staff, one person for composting; one for product stewardship, electronics, special projects, grants and studies; one person to maintain databases and work with businesses and processors, and one supervisor.

Success is measured through tones diverted and recycling economics study.

Major partners are local governments, other state agencies (Agriculture, Transportation, General Services, Community and Economic Development) and the Professional Recyclers of PA (trade organization representing recycling community in PA).

Contact: Georgia Kagle, gakle@state.pa.us

West Virginia

West Virginia market development program is within the state's environmental agency. They provide technical and business assistance to recycled product manufacturers, as well as grants and/or loans and promote buying recycled.

Funding comes from general revenues from a portion of landfill tipping fees. The office has a five staff and success is measured by tons diverted, and jobs created and retained. Major partners are the Department of Natural Resources and the state development office.

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Ohio

Ohio's market development program is part of the Department of Natural Resources Division of Recycling and Litter Prevention. They provide technical and business assistance to recycled product manufacturers, grants and/or loans, sponsor research into new recycling technologies, attract new recycled product manufacturers, provide assistance in feedstock conversion, and education and awareness on recycling, litter prevention, and source reduction. They also promote buy recycled, track markets and opportunities for various commodities, and fund other agencies to do recycling market development.

Funding comes from a two-tiered corporate franchise tax. They have a staff of 32 {is this for RMD?}.

Success is measured by tons diverted, jobs created, \$ and resources leveraged by clients, and economic impacts.

Contact: Donna Stusek, donna.stusek@dnr.state.oh.us

Colorado

Colorado has no formal RMD program. There is a loan program for recycling businesses located in the state Housing and Finance Authority. The Colorado Department of Local Affairs also runs a tire program that gives partial reimbursement to end users of scrap tires based on quantity of processed tires. The tire fund also provides grants to public entities purchasing products made from scrap tires. The CO Commission on

Higher Education gives out grants for research in recycling and various pollution prevention technologies. In the 3 years this program has been running, about \$400,000 has gone to research projects related to recycling. The CO Gov's Office of Energy Management & Conservation supports rural recycling workshops, has promoted electronics recycling & sponsored some collection events, and helps with the annual recycling conference run by the state recycling organization.

Funding for the above programs comes from a Waste Tire fund, which is funded from a surcharge of \$.75 levied on each scrap tire left behind in a tire shop (not point of sale). The CHFA loan fund was started through Waste Tire moneys but is now a self-funded revolving loan program.

There are no recycling market development staff in the state.

Contact: Anne Peters, Board Member, Colorado Association for Recycling, 303.494.4934 / annep@indra.com

New York

New York State's recycling market development program is within the Environmental Services Unit in the state's economic development agency. It provides technical and business assistance to recycled product manufacturers, grants and/or loans, sponsors research into new recycling technologies, attracts new businesses, and provides assistance in feedstock conversion. The Unit also provides information on markets and trends, P2 technical assistance and grants for businesses, is the clean air act ombudsman liaison between government agencies and businesses, promotes buy recycled, tracks market trends, provides funding to other agencies working on recycling market development, and partners with service providers to provide P2 and source reduction assistance to businesses.

Funding for salaries comes from the state budget. Program funding comes from the NYS Environmental Protection Fund, a dedicated fund created primarily from real estate transfer taxes and fees to support environmental improvements and initiatives in NYS; and from State Revenue Funds from the Clean Air Act Program).

There are ten staff people, including a director, loan/grant administrator, secretary, and 7 FTE professional service providers. Other service providers from MEP and consultants are contracted with as needed.

Success is measured by tons diverted, jobs created and retained, dollars and other resources leveraged by clients, dollars saved on avoided waste management, dollars saved on avoided purchase costs, dollars earned from new revenues/sales of recycled products. P2 accomplishments are measured in terms of amount of material generation avoided.

Partners include the State Dept. of Environmental Conservation's Bureau of Waste Reduction & Recycling (collection, education); NYS Office of General Services (procurement/end use); Manufacturing Extension Partnership (tech assistance waste audits in the manufacturing sector); NYS Energy Research & Development Authority (innovative research, energy efficiency, waste-to-energy); etc. Partners for other functions, such as Clean Air Act clients, include the NYS Environmental Facilities Corp., and State Dept. of Environmental Conservation's Bureau of Air.

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Massachusetts

Massachusetts recycling market development office is the Chelsea Center for Recycling and Economic Development. The Chelsea Center is organizationally part of the University of Massachusetts, although it is physically not located on campus. The Chelsea Center provides technical and business assistance to existing recycled product manufacturers, business assistance to existing recycled product manufacturers, grants to

businesses, including grants for independent testing of products and feedstocks, sponsors research into new recycling technologies, attracts businesses to the state, provides assistance in feedstock conversion, and provides interns to companies. The Chelsea Center also identifies new product opportunities, promotes buy recycled, tracks opportunities for various commodities, provides grants to communities and community based organizations to identify and implement programs to turn local wastes into local economic development benefit, and publishes a newsletter, technical reports and other results of funded projects, a directory of recycled product manufacturers, a directory of business and technical service providers in the state, and a directory of national testing labs for the recycling industry.

Until June 30, 2003, funding from the Chelsea Center comes from the Strategic Envirotechnology Partnership, part of state budget through the university. This funding covers three staff and most of the office overhead. Program funds and funds for an additional two staff come from the Executive Office of Environmental Affairs from the Clean Environment Fund, comprised of unredeemed bottle deposits.

Until September 2002, staff of five: Executive Director (overall strategy and direction); Director of Technical Programs (R&D, technology, product development and testing); Director of Business Programs (support for existing manufacturers); Director of Economic Development Programs (recycling-based community economic development projects, new business attraction); Office Manager (general administration, coordination, and some program management).

Success is measured by tons diverted, jobs created, jobs retained, dollars and other resources leveraged by clients.

Major partners are the University - operating expense funder and provides ready access to a pool of researchers and students to work on technical/technological and business planning aspects; Executive Office of Environmental Affairs/Department of Environmental Protection - staff and program funder - sets goals for the use of their funds and collaborates in setting market development priorities; Communities and non-profits - provide the venue and the ideas for supporting recycling-based economic development projects; Manufacturers - provide the markets for secondary materials and also participate in the Re-Made in Massachusetts Alliance - network of recycled content product manufacturers; various business and technical service providers throughout the state. Given the small staff at the Center, priority has been towards building partnerships with other business service providers rather than replicate services.

As of June 30, 2003 it is anticipated that state funding for the Chelsea Center will end and the Center will close its doors.

Contact: Michael Dimino, 617-887-2300, michaeld@chelseacenter.org

County and Regional

Portland, Oregon Metro

Metro is a regional service district serving three counties that runs facilities and develops/regulates infrastructure, with RMD as part of the Solid Waste and Recycling Department. Metro defines market development as improved demand AND supply. Metro has provided technical and business assistance and loans in the past, but mostly focuses on providing information, regulation and financial support to increase supply quantity/quality and demand for commodities and products. Metro also identifies new products, promotes buy recycled, tracks market trends and opportunities for various commodities, provides funding to other agencies to perform some aspect of recycling market development, develops demonstration projects for use of compost in erosion control, monitors residual levels in processed recyclables, underwrites local jurisdiction technical assistance for business waste reduction and buy-recycled promotion, grants funds to new and existing facilities that compost food wastes and MRF C&D wastes, buys equipment for and provides outreach and education on behalf of agencies that recover food for human consumption, provides technical assistance to lending institutions. Metro ran a loan program which is about to go defunct due to lack of qualified applicants.

Funding comes from a Regional Service Fee it charges on every ton of MSW disposed. Metro has a staff of 20 that work on various aspects of recycling. The Recycling Market Development Coordinator position is being cut from the budget due to the demise of the loan program and the agency's focus on material-specific aspects of market development.

Success is measured by tons diverted, per capita disposal, cost per ton diverted, number of calls answered, number of visitors to web sites, surveyed satisfaction levels.

Major partners include Local governments, including cities and counties. Partnerships have been forged with Oregon Economic and Community Development Department, Portland Development Commission, local public school systems and local banks. Metro interacts closely and regularly with the business community and with haulers, processors and end users, through advisory committees and other meetings.

Contact: Steve Engel, Recycling Market Development Coordinator, 503-797-1535, engels@metro.dst.or.us

Ventura County, CA

Ventura County's RMD program is located in the County Environmental and Energy Resources Department. It provides technical and business assistance to recycled product manufacturers, grants and loans to businesses, attracts new businesses, and provides assistance on feedstock conversion. It also promotes buying recycled and tracks opportunities for various commodities.

Funding comes from the state as well as from local refuse hauling surcharges and fees. There is one staff person.

Success is measured by tons diverted, money and other resources leveraged by clients, and number and amount of loans. The major partners are economic development agencies.

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